

MTU SPACE MANAGEMENT - INSTRUCTION GUIDE

Review Space Information for your department by going to the [ASPIRE Application](https://www.banweb.mtu.edu/pls/mtu/GEN_BLDGS_MAIN_MENU.p_aspcmenu) (select "Space" then "Space Coordinator Inquiry")

- The Space Management Strategy is to continually monitor information and correct errors and inaccuracies of existing space information.
- The validation process which was previously done by central administration now becomes part of the data collection and submission process. An elaborate set of error reports have been created to help you validate the integrity of your space data.
- Fatal Errors – These errors have to be corrected before the space information can be considered complete.
- Warnings – These discrepancies need not be corrected, however, they do provide another double check on the accuracy of the data as well as provide insights of inconsistencies of your departmental space data.

SPACE COORDINATOR EXPECTATIONS

MONTHLY REPORTS

FATAL & WARNING ERRORS

- Select the "Error Reports" pull down menu
- Select one of the 5 types of reports (you will need to run all 5)
- You will be taken to the Oracle reports to obtain these errors
- Select your department if it is not already pre-selected for you
- Change the "error type" pull down to "all errors" this will provide both the FATAL and WARNING errors (this may be pre-selected for you)
- This error report will provide instructions as to what data needs to be changed. We have done our best to make the room error verbiage as user-friendly as possible. If you are not clear on the instructions please email us at space@mtu.edu for further clarification. Believe it or not, your comments are very welcome. By forwarding your constructive comments and concerns, you are helping other departments as well as your own.

RESEARCH INDEXES WITH NO ROOM

- Select the "Indexes" pull down menu
- Select "Index Exceptions by Dept"
- Select the department desired
- Assign any indexes that appear on the report to the appropriate room(s) where the research is being conducted.
- Remember to adjust the functional usage percent to include the added index

YEARLY REVIEWS

FLOOR MAPS

- Select the "Space" pull down menu
- Select "Building Photos & Maps"
- Open both the Telcom CAD drawing for each floor (if available) & facilities pdf (if available) map. Compare to the room's actual layout, physical layout and room numbering to what is indicated on the various maps. Notify space@mtu.edu if there are any discrepancies. (Contact space@mtu.edu if you have forgotten/need the password for the facilities maps. Contact your systems administrator if you need the software to open the telcom maps)

CONTINUAL MAINTENANCE

OCCUPANT CHANGES/NEW INDEXES/OTHER NOTIFICATIONS

- Changes in employment status (new hire/terminated/department transfer) and new indexes (among other scenarios) will cause triggers in Banner to send out an automatic email to the space coordinator and space coordinator back-up.
- Upon receipt of email, complete the required action.
- Contact space@mtu.edu if you require assistance.
- If there are office 'swaps' within a department (where the employee status doesn't change, however, the employee moves into a different office within the same department) the occupant information needs to be updated accordingly.

GENERAL “HOW TO” GUIDANCE

MANUEVERING THROUGH SPACE - OCCUPANTS

- Occupant is the key driver of the room data. This space system pulls in the Banner HR payroll data for the occupant. You need to review and compare the “Payroll Distribution – Occupants” section with the indexes assigned in the “Accounting- Room Usage” section. The two sets of indexes may not match perfectly, but they should be similar.
- Since the web space system is linked to the Banner HR system, and since each occupant may have a different payroll distribution, it is important to identify each occupant.
- It is important that the items noted under “continual maintenance” are done...well, continually! In the very near future the goal is to use the ASPIRE database to generate the necessary data for producing the campus directory – so it will be critical that all PRIMARY rooms for occupants are correct.
- Occupants can be added to an infinite number of rooms (of course only if they actually WORK in those rooms)

ADDING AN OCCUPANT

- Click “change occupants” in the room information screen
- Select the desired occupant from the list provided
 - If the desired occupant does not appear on the list – select the “show all of the people” button and choose from the new list that is generated
- The occupant will appear in the “current occupants” section

DELETING AN OCCUPANT

- Click “change occupants” in the room information screen
- Click the “delete” button next to the name of the occupant to be removed in the “current occupants” section
- The occupant will be removed (unless the occupant has more than one room and the room that is currently selected is marked as “primary” – a warning message will appear stating “the delete was...NOT COMPLETED...”) Follow the procedure below for changing the primary room (noted below) – then come back to this process to delete the occupant.

CHANGING A PRIMARY ROOM FOR AN OCCUPANT

- Click “change occupants” in the room information screen
- Select the occupants name in the “current occupants” section
- Select the appropriate “primary” room by using the radio buttons
- Click the “update primary room” button
- If you need further clarification on “primary rooms” select “primary rooms explained” for a detailed explanation (located under the “update primary room” button)

WIDE WORLD OF INDEXES

- Since the occupant’s time and effort is recorded in Salaries and Wage (S&W) expenses, only indexes that have S&W attributed to them should be assigned to space (equipment only indexes are not assigned to space).
- The “Accounting – Room Usage” area in the “Room Information” screen lists the index(es) that are assigned to each room.

ASSIGNING AN INDEX

- Click “change indexes” in the room information screen
- Select the index to be added from the list
 - If the desired index does not appear on the list – select the “sort...ALL indexes by index only” button and choose from the new list that is generated
- The added index will appear in the “current indexes” section

DELETING AN INDEX

- Click “change indexes” in the room information screen
- Click the “delete” button next to the index to be removed in the “current indexes” section
- The index will be removed

ANOTHER VIEW – INDEXES WITH NO ROOM

- Click “change indexes” in the room information screen
- Click “show the indexes with NO ROOM” in the change indexes screen
- This will populate any research indexes that currently need to be assigned by the department who’s room has been selected (this is the same data that will appear on the “index exceptions by dept” report that is to be checked at least monthly)

WE ALL HAVE ATTRIBUTES (SOME GOOD, SOME NOT SO GOOD!)

- Each attribute is a simple “have” or “don’t have” response. The default is “Don’t Have”, so you will need to revise for the “Have” attributes.
- There are 3 distinct types of room attribute (basic, technology & laboratory). All are currently populated to some extent, however much work needs to be done to correctly populate all of the laboratory attributes.

ADDING AN ATTRIBUTE

- Click “change basic attr” in the room information screen
- Select the attribute desired for the room from the list provided
- The added attribute will appear in the “current attributes” section

DELETING AN ATTRIBUTE

- Click “change basic attr” in the room information screen
- Click the “delete” button next to the attribute to be removed in the “current indexes” section
- The attribute will be removed

WHOSE ROOM IS THIS ANYWAY?

- All rooms have a department “owner” and department “user”. The “user” may occupy the space, however, the space management becomes the responsibility and must be completed by the “owning” department. This “use” can be for a pre-defined time or for an undefined time.

CHANGE OWNER/USER OF A ROOM

- An e-mail request to space@mtu.edu must come from the current “owner” requesting the change
- In your e-mail, explain:
 - What department will the room be owned by
 - What department will the room be used by
 - What is the estimated length of time the room will be used by another department (if applicable)

The room data will centrally updated within a few days with the proper changes. You will be notified when the request has been completed.

HOLDING A ROOM FOR A NEW OCCUPANT

- An e-mail request to space@mtu.edu must come from the current “owner” requesting the change
- In your e-mail, explain:
 - What is the anticipated date of occupancy
 - Indicate if the space is being reserved for a newly created position

The room data will centrally updated within a few days with the proper changes. You will be notified when the request has been completed.

UNRAVELING “THE CODES”

CIP Code (Classification of Instructional Programs) – Only necessary if you deal with instruction (academic departments). If the room is prorated and you can separate the space between two or more indicated CIP codes, then do so. If you cannot separate the space, then use the bold CIP code on the CIP Code sheet, because it is the primary code.

Use Code – Every room needs **at least one** use code. If more than one is necessary, then the room will need to be prorated (see above notation on prorating). Remember – this information is from the campus level, not the department level. For example, there is a significant difference between Central Stores (730) and Department Storage (315).

Func Code (Function) – Every room needs a Func code. If a room has more than one function, then pick its primary function.

FEEL FREE TO LEAVE YOUR COMMENTS HERE

- This field is optional. Include general comments about the room. As an example, “storage room” or “break room”.
- There is no need to have redundant data in the database. For example, if the occupant field is populated, and occupant data is also included in the comments field, then please delete the occupant from the comments field.

ENTERING COMMENTS

- Enter the desired text in the “comment” box
- Click “update”

WHAT CONDITION MY CONDITION WAS IN

- The “condition” pull down menu applies to all rooms that have **any** research related activity. This is required for the NSF/NIH Survey of Science and Engineering Research Facilities. If the room(s) **DO NOT** have assigned research activity, then you will not see this data field.

CHOOSING YOUR CONDITION

- Select your desired condition
 - *Superior Condition* - Suitable for the most scientifically competitive research in this field over the next 2 years.
 - *Satisfactory Condition* - Suitable for continued use over the next 2 years for most levels of research in this field, but may require minor repairs or renovation.
 - *Requires Renovation* – Will no longer be suitable for current research without undergoing major renovation within the next 2 years.
 - *Requires Replacement* – Should stop using space for current research within the next 2 years.
- Click “update”

REGARDING WORKSTATIONS

- The general rule is to list the normal maximum occupancy of the room. Revise as necessary.
- Do not lose sleep over how many workstations are in a room. This is most critical when the room is a classroom. Just use your best judgment.

WORKSTATION THEORY BY AREA

- Classrooms – The Registrar’s Office should list the maximum number of students you would like in the room (number of seats).
- Offices – list the normal amount of people who are usually in that office. If an office usually has one person, but also has a small table with chairs, just list one person. If it has a non-student employee station and a student station indicate two workstations (also use the basic attributes as noted above to indicate what type of student station exists – undergrad/graduate).
- Conference rooms – list the maximum occupancy for the room.

- Machine shops – list the number of machines.

WORKSTATION ENTRY

- Enter the desired number of workstations in the appropriate box
- Click “update”

I DON'T HAVE A RULER – NOW WHAT!?

- As humorous as it would be to watch all the space coordinators running around with rulers measuring rooms or counting ceiling tiles, we don't expect that. The “area” field is managed in conjunction with the Facilities Department. If upon review of your maps (as described in the “expectations” section) you notice a blatant discrepancy (ASPIRE says 15 sqft and the room is obviously more than the size of a phone booth) then send an email to space@mtu.edu noting the discrepancy.
- If your department is planning or undergoing construction, please send a reminder email to space@mtu.edu so we can be sure to make the necessary changes to the maps, area, etc. Sometimes the first people who should know are actually the last to know!

YOU'RE OK – I'M OK

- Room Data Status should be updated as the space coordinator reviews the space to confirm that the data listed is accurate.

CHANGING ROOM DATA STATUS

- Select the pull down menu (if already noted “ok” change to “not ok” or vice versa if needed)
- Click “update”
- Re-click “ok” (or “not ok” if the original selection was “not ok”)
- Click “update”

A-21? ARE WE PLAYING BINGO?!

- The A-21 is a circular produced by one of our fine governmental agencies (OMB - Office of Management and Budget) that establishes principles for determining costs applicable to grants, contracts, and other agreements with education institutions (aren't you glad you asked?).
- See the [Space Definition Sheet](#) for an explanation of these items. The [Definition Sheet](#) also includes examples of rooms that should be included and/or excluded from each category.
- To accurately report on Michigan Tech's space usage, it is VITAL that this section is updated honestly, accurately, and frequently.
- Each index that is assigned to a room (see “wide world of indexes ” section above) will need to have a certain percentage of use attributed to it.

MODIFYING THE A-21 FUNCTIONAL USAGE PERCENTS

- Review the “Accounting-Room Usage” section
- Determine the percentage of effort expended on each index in the room
- Enter the percentages in the “A-21 Functional Usage Percents” section (must equal 100%)
- Click “update”

SHOW ME DA MONEY

- Payroll distribution information comes from the Banner HR tables associated with the assigned room occupant. You only need to review this data. You do not have to input or change any of this data.

TOOLS OF THE TRADE

- Space Coordinators should review the assigned pieces of equipment with your Equipment Coordinator. This is not a complete equipment inventory list. This equipment list only includes equipment items that are not fully depreciated.

UNCOVER THE MYSTERY OF PRORATING

- The **only time** a room should be prorated is if that room is split between two departments, if the room has multiple use codes, **and** if **each** of the prorated portions equal 500 sqft or greater. **NEVER** prorate a room that is under 1000 sqft.
- When a room is only **occasionally** used for a different use, then list the primary use code and **do not** prorate.

PRORATE AND/OR REMOVE A PRORATE FROM A ROOM

- E-mail the request to space@mtu.edu – someone will contact you to work with you on your request
- The appropriate Banner indexes should be assigned to the applicable prorates after you have received notification of the prorate completion for the room requested.
- The appropriate Banner index(es) should be assigned to any remaining prorates **or** should be assigned to the full room space if all prorates have been removed after you have received notification that the prorate removal has been completed for the room requested.
- If the room is being used by multiple departments and/or has different use codes, but **does not** fall within the prorate parameters noted above, all the appropriate indexes will still need to be assigned to the room and the functional use percent calculated accordingly (this may require communication between space coordinators—oh the horror!).

OTHER RESOURCES

Use the [FAQ](#) section of the space inventory website for valuable resources. You can also e-mail space@mtu.edu if your question is not listed on the FAQ page.